# The State Board of Equalization Welcomes You to the:

***eFile Tutorial Introduction / Registration***

Welcome to the Board of Equalization’s electronic filing program, BOE-file. E-filing is the Board of Equalizations’, commonly called BOE, prescribed method for filing your sales and use tax returns and making payment over the Internet. Nearly all sales and use tax accounts are eligible to E-file.

## eFile Tutorial – Introduction / Registration

- Efiling benefits everyone.

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# eFile Tutorial – Introduction / Registration

- You benefit with a quick and easy way to file your return.  And it's free.  You can E-file any time from anywhere.  All you need is an Internet connection.  We'll even do the math for you.

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## eFile Tutorial – Introduction / Registration

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# eFile Tutorial – Introduction / Registration

- At anytime during this video, you can click pause and go to your live screen to enter your personal information.

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## eFile Tutorial – Introduction / Registration

***Register as an eClient***

- First, you will register as an eClient. Registration is quick and easy. Before you begin, you will need your account number and Express Login code. You can find your account number and express login code on most correspondence sent to you from the BOE.

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## eFile Tutorial – Introduction / Registration

- Once you are on the BOE website, just click on the eServices tab and select “Register as an eClient”.

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## eFile Tutorial – Introduction / Registration

- Select your tax program….Sales and Use Tax
- Enter your account number.  Enter numbers only. Do not include any letters or symbols.
- Enter your name as you are registered with the BOE
- Enter your Express Login code.
- Click Continue.

Select your tax program….Sales and Use Tax

Enter your account number.  Enter numbers only. Do not include any letters or symbols.

Enter your name as you are registered with the BOE

Enter your Express Login code.

Click Continue.

## eFile Tutorial – Introduction / Registration

- Next you will be asked to create your own User ID. Your USER ID will be used to login to the E-file system. Re-enter the User ID.

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## eFile Tutorial – Introduction / Registration

- Now you will create a password. And then re-enter the same password.

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## eFile Tutorial – Introduction / Registration

- Select a forgotten password question and enter an answer.  If you ever forget your password, you can reset your own password by answering the question you select.

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## eFile Tutorial – Introduction / Registration

- Finally, you will enter your email address and if different, a business email address. The BOE will send you email reminders of your approaching tax due dates.

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## eFile Tutorial – Introduction / Registration

- That's it.  You are registered as an eClient.  Now you can use your User ID and password you just created to login to the E-file system and file a return.

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## eFile Tutorial – Introduction / Registration

### *E-file Your Return*

- Before you begin efiling you will need to have your sales and deduction information. Once you have this information you are ready to log in to the E-file system to file your return.

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# eFile Tutorial – Introduction / Registration

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## eFile Tutorial – Introduction / Registration

- Enter dollar amounts only, rounding up to the nearest dollar. Make sure not to use any punctuation, any commas or decimals.

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## eFile Tutorial – Introduction / Registration

- While navigating through our E-file system, do not use your browser back button. Instead, use the navigation buttons on the bottom of the page.

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## eFile Tutorial – Introduction / Registration

- If you are unsure what to enter on a particular line, click on the question mark.  A new window will open to provide a detailed explanation.

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# eFile Tutorial – Introduction / Registration

- This is the main page of the E-file return. At the top of the page you will find the filing period, the due date and the type of return you are filing.

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## eFile Tutorial –
## Introduction / Registration

- Now, let’s begin entering sales figures into the return.

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## eFile Tutorial – Introduction / Registration

- Enter your total gross sales here.  Your total gross sales may or may not include your sales tax that you have collected during the period.

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## eFile Tutorial – Introduction / Registration

- In our example, we will use $100,000 as our total gross sales, which includes sales tax.
- If sales tax is included in gross sales, be sure to enter the amount of sales tax collected as a deduction on the next page.

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## eFile Tutorial – Introduction / Registration

- Any purchases subject to use tax are entered here.  This amount would include any items you purchased for use in your business which you did not pay any tax on, such as fixed assets, supplies, or inventory withdrawals for your own use.  If you need more information on “purchases subject to use tax”, please click the question mark.

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## eFile Tutorial – Introduction / Registration

- In our example, we have $2,000 worth of purchases subject to use tax.

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## eFile Tutorial –
## Introduction / Registration

- If you had any sales where tax did not apply or you included tax in your gross sales, click on the deductions button.

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## eFile Tutorial – Introduction / Registration

- For example, if you made sales to other retailers for the purpose of resale, enter that amount here.

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## eFile Tutorial – Introduction / Registration

- For further information on deductions, click on the question marks for more information.

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## eFile Tutorial – Introduction / Registration

- In our example, we have $10,000 worth of sales to other retailers.
- In our example, we included $7,225 of tax collected in our gross sales figure.
- Since we included sales tax in our gross sales, we will enter the amount collected here.

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## eFile Tutorial – Introduction / Registration

- Once you have completed entering your deductions, click “continue” to return to the main page.

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## eFile Tutorial – Introduction / Registration

- Next, click on the “District Tax” button. On this page, you will let us know where your sales occurred.

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## eFile Tutorial – Introduction / Registration

- If you are an EZ filer the district tax page has been prefilled for your convenience. If you need to make any changes make them now.

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## eFile Tutorial – Introduction / Registration

- Your taxable transactions have already been calculated and are displayed here. Enter any transactions not in a district tax area here.

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## eFile Tutorial –
## Introduction / Registration

- For our example, we have $4,000 of sales delivered to locations not in a district tax area.

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## eFile Tutorial – Introduction / Registration

- The remaining amount is the “amount of district transactions” which needs to be allocated in the table below to the appropriate counties and cities.

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## eFile Tutorial – Introduction / Registration

- The table is in alphabetical order by county, with the cities listed below their county.

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## eFile Tutorial – Introduction / Registration

- Enter the sales figures for the county or city in the first column.

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## eFile Tutorial – Introduction / Registration

- Once all the sales figures have been entered, the total district tax is calculated and displayed below the table along with the total amount of sales you entered for each county.

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## eFile Tutorial – Introduction / Registration

- Below the table the total amount of sales you entered is calculated and displayed. This total needs to match the “amount of district transactions” located above the table. These amounts must equal each other before you can successfully E-file your return.

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## eFile Tutorial – Introduction / Registration

- For our example, we have $40,000 of sales in Riverside County and $40,775 of sales in San Bernardino County.
- Scroll through the table to locate Riverside County, then enter $40,000 in the first column under allocated sales to districts.
- Next, scroll down to the County of San Bernardino and enter $40,775 in the first column.
- Now that we have entered in our sales figures, note that our amount of district transactions of $80,775 at the top of the form matches the total allocated sales to districts that is calculated at the bottom of the form.

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Next, scroll down to the County of San Bernardino and enter $40,775 in the first column.

Now that we have entered in our sales figures, note that our amount of district transactions of $80,775 at the top of the form matches the total allocated sales to districts that is calculated at the bottom of the form.

## eFile Tutorial – Introduction / Registration

- Your total district tax has been calculated for you and displays on the last line.

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## eFile Tutorial – Introduction / Registration

- Once your figures balance, please click "continue" to return to the main page.

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## eFile Tutorial –
## Introduction / Registration

- Once all your figures are entered, click “continue” to go to a review page.
- Remember, you may not have information to enter in every box.

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## eFile Tutorial – Introduction / Registration

- Please confirm the figures on this page if you need to correct any information you can click “prior page” to go back to the main page of the return.
- If everything looks correct, click continue.

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If everything looks correct, click continue.

## eFile Tutorial – Introduction / Registration

- Next you will enter your preparer and payment information.

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## eFile Tutorial – Introduction / Registration

- Complete either the preparer or the paid preparer section. You must complete one section or the other, but not both.

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## eFile Tutorial – Introduction / Registration

- Finally, you will enter your payment information.  Three convenient payment methods are available.

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## eFile Tutorial –
## Introduction / Registration

- Selecting eCheck allows you to pay electronically.  Simply enter your banking information and select your payment date.  For your convenience, you can select to make your payment on any date up to the due date of the return.  eCheck makes your entire transaction paperless and worry free.

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## eFile Tutorial – Introduction / Registration

- You may also pay by credit card.  If you select to pay by credit card, you will be directed to our third party credit card vendor to make your credit card payment.  The vendor charges a 2.5% convenience fee. This is not revenue to the BOE.

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## eFile Tutorial – Introduction / Registration

- Finally, you can pay by paper check. A payment voucher will print after the confirmation page when you finish filing your return. Just send in the voucher with your physical check to the address on the payment voucher.

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## eFile Tutorial – Introduction / Registration

- Once you have completed your payment information click “continue” to go to a summary page of your payment information.  Review the information for accuracy and click “file and pay” at the bottom of the page.

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## eFile Tutorial – Introduction / Registration

- You are finished! It’s that simple to efile your return with the State Board of Equalization.  The final step is to print the confirmation page by clicking on the printer icon.  Remember if you selected to pay by paper check you must send in your check with the payment voucher that prints immediately following the confirmation page.

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Thanks for viewing this training video. You are now ready to efile your sales and use tax return with BOE-file, the Board of Equalization’s electronic filing program.